DOCUMENT RESUME

ED 034 918 AC 006 156

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|---|---|
| TITLE | A Report on the Operation of the Evening and Correspondence Course Policy (TB 620135). |
| PUB DATE | Jul 68 |
| NOTE | 57p. |
| EDRS PRICE | EDRS Price MF-$0.25 HC-$2.95 |
| DESCRIPTORS | *Correspondence Study, Evaluation, *Evening Classes, Financial Policy, *Financial Support, *Government Employees, Investigations, Occupations, *Off the Job Training, Opinions, Organization Size (Groups), Participation, Tuition, University Extension |
| IDENTIFIERS | *Canada |

ABSTRACT

A study was made of the application, during the 1966-67 academic year, of a policy of tuition fee reimbursements up to 50% for Canadian public service employees in job related evening or correspondence courses. Methods were a literature review, a questionnaire survey of deputy heads, followup interviews with departmental officers, a study of industrial policy, and consultation with an advisory panel. Much unevenness was found, with marked variations in frequency of reimbursement by occupation, salary, and size of jurisdiction. Reasonable satisfaction with terms of the present policy was expressed except regarding the bar on second language learning. Training Board expectations about department and agency management had not been met and improvement was required. In many cases planning and programing of training had been incomplete; policy interpretation and application, defective; and need determination and benefit assessment, rudimentary. It was recommended that reimbursement be total for job related employee training, with extended scope to cover certain direct training costs beyond tuition and examination fees. (Also included are six tables, 13 references, and appendixes on existing policies and opinions, outside practices, and explanations of training needs.) (ly)

ED034918



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# A

# REPORT ON

# OPERATION OF THE

# EVENING AND CORRESPONDENCE COURSE

# POLICY

# (TB 620135)

TRAINING POLICY GROUP - MANPOWER DIVISION

PERSONNEL POLICY BRANCH

TREASURY BOARD

JULY, 1968

AC 006 156

# S U M M A R Y


Since March 6, 1964 deputy heads have had authority to reimburse up to 50% of tuition fees for job-related training taken by employees in the evening or by correspondence course.

This report deals with the results of a study of the application of the Policy in the service during the 1966-67 academic year with the objectives of reviewing the Policy, assessing departmental performance in its application, and determining any tangible benefits which have resulted.

Study methods included a questionnaire sent to all deputy heads, follow-up interviews with departmental officers, a special study of industrial policy prepared by International Correspondence Schools, a review of literature, and consultation with an advisory panel drawn from within the service. Results cover practices of 34 jurisdictions employing 99% of employees in the Public Service.

Employee training by evening and correspondence course has approximately doubled in real terms since the policy was instituted in 1964. For 1966-67, some 3,500 participants received reimbursement totalling about $146,000.

Considerable unevenness in application of the Policy exists. There is a marked variation in frequency of reimbursement by occupational category, salary level, and size of jurisdiction. While some difference can be expected, much appears to be the result of limited publicization of the programs which, it is recommended, should be increased.

Department and agency views indicate reasonable satisfaction with the terms of the present policy, except regarding the bar against English and French language training, and in connection with the basis for, and rate of payments. It is recommended that the bar be removed on second language training on the grounds that urgent unsatisfied needs will not otherwise be met.

It is also recommended that the level of reimbursement be raised to 100% and the scope of application be extended to cover certain other direct costs of training in addition to tuition and examination fees. The proposed changes recognize the modest cost of such training, the heavy investment of student time, and would:

- be compatible with Board decisions on a range of individual cases,
- remove anomalies in employee treatment compared to training during normal working hours, and based on different institutional billing systems, and
- be congruent with outside practice on the continent by larger employers.


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It is concluded that reimbursement should be based on the extent to which the operations of the employing organization benefit through the increased capability of the trainee. Accordingly, it is further recommended that full reimbursement apply only to training which will improve an employee's productivity in his present work, or fit an employee for other duties following the training. Other, less specific needs in the service, would continue to be met by 50% reimbursement.

Survey findings show that Treasury Board expectations about department and agency management of the Policy have not been met and that improvements are required. In many cases planning and programming of such training has been incomplete; interpretation and application of the Policy, defective; and need determination and benefit assessment, rudimentary.

The spectrum in quality of performance suggests that no steps should be taken to make the Policy more permissive until average performance meets minimum expectations. This would have the effect of penalizing high performance without establishing an obvious incentive where improvement is necessary. Resolution lies in the recommendation that any liberalization of the Policy be applied selectively, as individual departments and agencies propose an acceptable program of management to the Board.

# PART I

## INTRODUCTION AND METHODS

### Introduction

Since March 6, 1964 deputy heads of departments and agencies in the Public Service have been authorized to reimburse up to half of tuition and examination fees for job-related training taken by employees in the evening or by correspondence course. (See Appendix A for details.) At the time this authorization was granted, it constituted the first significant relaxation in the control of out-service training in a number of years.

By early 1967, it was felt that sufficient time had elapsed for departments and agencies to have applied the policy, identified any deficiences, and made at least a preliminary estimate of benefits. In addition, increasing attention was being given to the circumstances under which there could be a further general relaxation of controls in this, and other areas of training and development. Two unresolved questions centered on

- the probability that any directions issued by the Board would be interpreted and followed as intended (particularly if highly permissive), and

- the general effectiveness of management of training and development programs in the Service.

It was decided to conduct a study, dealing with these questions, having as its objectives:

1. The review, clarification, and revision of the policy.
2. The assessment of departmental and agency performance in managing the Policy.
3. The identification, in a general way, of the benefits which had been secured through application of the Policy.

It was believed that a review with limited objectives could be carried out in a short period of time since all deputy heads had been asked, when the authorization was initially granted, to ensure that records were maintained of individual employee participation.

### Method

This study was conducted by means of a three-part questionnaire which was mailed to all departments and agencies in the Public Service. The first part dealt with statistics on individual employee participation in evening and correspondence courses; the second, with the machinery

which had been established to manage the Evening and Correspondence Course policy; and the third, to secure views on the requirement for policy changes. The request for statistical information was confined to a twelve-month period commencing June 1, 1966, in order to secure information relevant to the 1966-67 academic year. (A copy of this questionnaire is available on request.)

Prior to mailing, the draft questionnaire was made available to the heads of departmental training and development units for comments and suggestions. Following mailing, contact was maintained with individual departments to interpret survey requirements, hasten replies and clarify reports.

Response to the questionnaire was excellent. All 54 departments and agencies queried responded in sufficient detail for survey purposes. Of these, 37 indicated that employees had participated under the Evening and Correspondence Course Policy during the twelve-month period of the survey. The remaining 17 departments and agencies included the majority of smaller jurisdictions and comprised less than 1% of people employed in the Public Service.

The survey forms were designed by Mr. N. d'Eca, and the initial summarization analysis of data was developed by Miss P. Whelan, both of Treasury Board Staff. Development of background to the questionnaire and initial contacts with departments and agencies was carried out by Mr. J.S. O'Neal, while on loan from the Department of National Health and Welfare.

A special study of tuition reimbursement policies, for approximately a 1000 companies in the United States of America, was made at the request of Treasury Board under the direction of Mr. J.C. [illegible]liaume, President, International Correspondence Schools, Scranton, Pennsylvania. This study was conducted to supplement information on reimbursement practices already available in the literature. (See Appendix C.)

This Report was reviewed by an ad hoc committee of departmental officers composed of Messrs. J. Aldred, D.G. Black, J.W. Elliot, I.S. Harlock, F.J. Lancaster, E.G. Law, and B.D. Seed. The results of this review are reported in Appendix F. Additional comments were received in the draft stage from other officers of the Treasury Board Secretariat. Recommendations and conclusions were also discussed in a general meeting of training directors.

Final responsibility for the conduct of the study and resulting recommendations rests with the Training Policy Group, Manpower Division, Personnel Policy Branch, Treasury Board.

For convenience, survey findings, a discussion of results, and conclusions have been combined together in the various Parts and forming body of the Report.

## PART II

## EMPLOYEE PARTICIPATION

This Part includes information on the extent of the employee training under the Evening and Correspondence Course Policy for the academic year 1966-67. Some data were based on departmental expectations of the Occupational Category to which employees would be later allocated. Information on the training of a small number of employees receiving full reimbursement under special terminable authorities is not included in this Report.

There were 3,521 participants who received about $147,070 in reimbursements. This compares to approximately 70 participants and a probable reimbursement of about $1,400 in 1963-64. It is known that at least a further 1,800 employees were taking job-related training entirely at their own expense, at that time, which would now qualify under the present Policy for reimbursement.

### Location

Table I shows how 1966-67 participation occurred by location. About 7% more employees at headquarters received training under the Policy than would be expected from the number employed. This is not viewed, in itself, as significant.

### TABLE I

### Relationship Between Location of Participating Employees and Location of Employment

| Location | Percent Participating Employees A | Percent Total Employment B | Difference (A-B) |
|---|---|---|---|
| Ottawa-Hull | 34% | 27% | +7% |
| Rest of Canada | 66% | 72% | (-6) |
| Foreign | (Trace) | 1% | (-1) |
| | 100% | 100% | |

Occupational Category

Table II shows the extent of employee participation in the tuition reimbursement program by Occupational Category in relation to estimated distribution of employment. About one-third more training is taking place in the Administrative and Foreign Service Category and about one-third less in the Operational Category under the Policy than is suggested by the relative number of employees in each.

More than half of courses taken related to "administrative" as contrasted to "operational" activities.

TABLE II

Distribution of Employee Participation in Relation to Distribution of Employment, by Occupational Category

| Occupational Category | Number of Employees | % Employees Participating (A) | % Employment (B) | Difference (A-B) |
|---|---|---|---|---|
| Executive | 3 | (Trace) | (Trace) | - |
| Administrative & Foreign Service | 1485 | 42% | 11% | +31% |
| Scientific and Professional | 451 | 13 | 9 | + 4 |
| Administrative Support | 813 | 23 | 28 | (-5) |
| Operational | 247 | 7 | 41 | (-34) |
| Technical | 522 | 15 | 11 | + 4 |
| | 3521 | 100% | 100% | |

Salary

Extent of employee participation may also be viewed in relation to salary. Table III provides a comparative distribution of participants' salaries in relation to that of all employees. While the median salary of all employees was in the range $4,000 to $4,999, the median salary of employees receiving reimbursement was in the range $7,000 to $7,999. About 68% of reimbursements were made to employees receiving salaries among the top 16% and only 1% of reimbursements were made to employees receiving salaries in the bottom 24% of those paid.

TABLE III

Distribution of Employee Participation in Relation to Distribution of Employment, by Salary

| | Participating Employees Percent (A) | Total Employment Percent (B) | Difference (A-B) |
|---|---|---|---|
| Under $4000 | 1% | 24% | (-23%) |
| $4000 - 4999 | 4 | 27 | (-23) |
| $5000 - 5999 | 12 | 23 | (-11) |
| $6000 - 6999 | 15 | 10 | + 5 |
| $7000 - 7999 | 31 | 5 | +26 |
| $8000 - 8999 | 15 | 3 | +12 |
| $9000 - 9999 | 7 | 2 | + 5 |
| $10000 - 10999 | 6 | 2 | + 4 |
| $11000 - 11999 | 4 | 1 | + 3 |
| over 11999 | 5 | 3 | + 2 |
| | 100% | 100% | |

Reimbursement Rate

At the time the Correspondence and Evening Course Policy was first established in 1964, it was anticipated that a significant portion of tuition reimbursements would conform to then current industrial practice by falling below the ceiling of 50 percent. The data in Table IV shows that this has occurred in only 4% of cases and that the maximum has been paid in 93% of cases. The remaining 3% of cases is for training which was authorized in advance but for which no reimbursement was made. Among the causes were failure to undertake or successfully complete the training, resignation, late claims, etc.

Course Type

The data also show that 75% of the training taken was by evening course. In 1962-63 the comparative figure was 61 percent. The ratio of evening course participation to use of correspondence courses was highest for the Technical (17:1) and Professional (11:1) Categories and lowest for the Administrative Support Category (2:1). The ratio for the Administrative and Foreign Service Category fitted around the average rate of three to one.

TABLE IV

Rate of Reimbursement and Course Type, By Occupational Category

| Occupational Category | Rate of Reimbursement | | | Course Type | | |
|---|---|---|---|---|---|---|
| | 50% | Other | Nil | Evening | Correspondence | Other |
| Executive | 2 | - | 1 | 3 | - | - |
| Administrative & Foreign Service | 1388 | 77 | 20 | 1047 | 400 | 38 |
| Scientific & Professional | 413 | 3 | 35 | 400 | 38 | 13 |
| Administrative Support | 710 | 76 | 27 | 510 | 298 | 5 |
| Operational | 247 | - | - | 211 | 36 | - |
| Technical | 505 | 1 | 16 | 485 | 29 | 8 |
| Totals | 3265 | 157 | 99 | 2656 | 801 | 64 |
| Percent | 93% | 4% | 3% | 75% | 23% | 2% |

## Relationship to Duties

From Table V it will be seen that 69% of reimbursed training related primarily to present duties and 31% to future work assignments. Excluding the Executive Category, the highest proportions of training related to future needs were found for the Administrative and Foreign Service and the Administrative Support Categories. The reason for this is not apparent from the data.

TABLE V

Relationship of Training to Present or Future Duties

| Occupational Category | Present Duties | Training For Future Specific Duties | Future General Requirements | Percent Present Duties of Total |
|---|---|---|---|---|
| Executive | 2 | 1 | - | - |
| Administrative and Foreign Service | 879 | 412 | 194 | 59% |
| Scientific and Professional | 380 | 28 | 43 | 84 |
| Administrative Support | 543 | 99 | 171 | 67 |
| Operational | 204 | 10 | 33 | 83 |
| Technical | 432 | 13 | 77 | 83 |
| Totals | 2440 | 563 | 518 | |
| Percent | 69% | 16% | 15% | |

Organization Size

Table VI shows the relationship between size of department or agency, and frequency of participation and average amount of reimbursement. On the average there was one reimbursement for every 64 continuing employees. The rate of participation seems to vary with the size of the employing department, being low with the smaller agencies and the least with the largest departments, when compared to departments and agencies of medium size.

The amount of reimbursement per participant averages less with the smallest and largest components, and the most with the departments falling in the range of 2,000 to 8,000 continuing employees.

Occupational mixture, no doubt, has some significant effect on these data.

TABLE VI

Relationship of Size of Department or Agency to Frequency of Participation and Average Amount Reimbursed Per Participant

| Department Size | Number | Number of Employees Per Participant | Average Amount Reimbursed Per Participant |
|---|---|---|---|
| Under 2,000 employees | 14 | 43 | $40 |
| 2,001 to 4,000 employees | 8 | 34 | 43 |
| 4,001 to 8,000 employees | 8 | 34 | 53 |
| 8,001 to 16,000 employees | 4 | 65 | 44 |
| over 16,000 employees | 3 | 277 | 36 |
| Total | 37 | - | - |
| Average All Cases | - | 64 | $47 |

## Discussion and Conclusions

It was expected that introduction of the Evening and Correspondence Course Policy in 1964 would result in a considerable increase in the use of these forms of training in the Service. Such a stimulant was considered desirable in view of the obvious economy of this approach to increasing employee knowledge and skills.

It is estimated that the amount of job-related training going on in the Service has doubled since introduction of the Policy, and the amount of training payments has risen by a factor of over one hundred. (Almost none of such training was paid for prior to 1964).

This rapid expansion, largely due to the efforts of departments and agencies, has not been without some difficulties best illustrated by certain patterns in the survey data. For example, as a typical profile, the employees at present most likely or least likely to receive tuition aid are as follows:

| | Most Likely | Least Likely |
|---|---|---|
| Department Size | Medium-Sized | Very Large |
| Location | Ottawa-Hull | Outside Ottawa-Hull |
| Occupational Category | Admin. & Foreign Service | Operational |
| Annual Salary | $7000 - 8000 | Under $4000 |
| Course Type | Evening | Correspondence |
| Reimbursement Rate | 50% | 33 1/3% |
| Relationship of Training to Duties | Present Duties | Future Duties |

These profiles follow the general pattern to be expected of a recently initiated personnel program as increasing activity radiates out from a central point in headquarters. They are readily understandable in terms of what is generally known about the effects of size of organization, proximity from the centre, employee attitudes and abilities, structural opportunities and more important, the availability of suitable training.

In a normal situation many of these differences could well disappear over the course of time. There are several, however, which cannot entirely be accounted for in this way, and which may not disappear readily:

1. The high number of employees in the Administration and Foreign Service Category receiving tuition aid - approximately four times more than the proportion employed - and the exact opposite degree of participation in the Operational Category. (Table II).

2. The strong bias of reimbursements towards employees of higher salary levels - the top 16% of employees by salary were receiving 68% of tuition aid and the bottom 24%, only 1% of aid. (Table III).

3. The significant proportion of total cases (31%) involving training to meet future needs. (Table V).

4. The very low level of participation - 1 employee per 277 - in the larger departments of government. (Table VI).

Since slightly over half the training covered by the Policy is employee-initiated, it is to be expected that motivation is playing a strong part in participation. If this is coupled with incomplete or one-time communication of policy details, which is discussed in Part IV of this Report, then the above difference might be partially explained as an expression of:

- greater motivation to learn on the part of senior employees, particularly, for career purposes;

- greater knowledge about, and access to the details of the Policy by employees in the Administrative and Foreign Service Category, and the converse for the Operational Category.

It is recommended that:-

1. Future direction given by the Board on the Evening and Correspondence Course Policy should encourage wider publicization of the opportunity provided to employees for self-improvement.

   (See also Part IV of this Report.)

# PART III

## POLICY REVIEW

This Part summarizes the views of departments and agencies on the requirement for change in the existing Evening and Correspondence Course Policy as reported in Appendix B. These views were elicited by a questionnaire based on a list of alternative approaches to the present policy now in vogue in the private sector in Canada and the United States of America. In a number of cases it was necessary to discuss written responses with originating officers to secure a clarification and expansion of views.

The views of departments and agencies confirm the acceptability of most facets of the present Evening and Correspondence Course Policy, and a review of literature (Appendix C) indicates the Policy is substantially congruent with outside practices.

For convenience of consideration, this Part of the Report is divided into a number of sections, each one of which contains a statement of present policy, the survey findings, a discussion, conclusions reached, and any recommendations for change.

### Employee Eligibility

The Evening and Correspondence Course Policy applies to all employees in the Public Service, and to members of the R.C.M.P., irrespective of occupation, location, terms and conditions of employment, and length of service.

The departments and agencies were almost in accord (86%) with the view that reimbursement for training should be applicable to all employees without restriction. This opinion is grounded in the belief that employees should have equal opportunity under the policy, subject to the needs of the organization.

A few respondents would have liked to exclude from the policy employees appointed on a casual or part-time basis, while on probation following initial appointment, or prior to retirement. This view is grounded in the improbability that training could be justified, and a desire not to raise employees' expectations unnecessarily.

There seems to be no great requirement for the Board to limit the eligibility of employees. Any restriction felt necessary for administrative reasons would be based on departmental considerations and best established at that source. If the decision to support training is based primarily on the needs of the organization and the suitability of the individual applicants, then natural circumstances will normally achieve the kind of supplementary limits on eligibility found in the minority of outside practice without denying, or appearing to deny, basic opportunity.

It is concluded that no change should be made in the basic eligibility of all employees for assistance under the Policy.

Program Exemptions - General

While the Evening and Correspondence Course Policy has always applied to all out-service training taken in the evening or by the correspondence method, it has not applied to

- vocational training courses under the Technical and Vocational Training Assistant Act;

- courses covered by provisions of the National Health Grants Program;

- English or French language training courses (where the basic purpose is to acquire or improve a second language skill), and to

- in-service courses of any kind.

Departments and agencies were divided in opinion as to whether or not the Policy should continue to exclude training under the Technical and Vocational Assistance Act and National Health Grants Program. Some 54% felt that these restrictions should be continued and 3% felt there should be other limitations as well. One such was a prohibition against reimbursement of tuition fees where the government has already made a significant contribution to course costs, such as under the Occupational Training of Adults Program.

Exemption of application of the Policy to training under the Technical and Vocational Assistance Act and the National Health Grants Program is no longer relevant. These limitations were established to meet contemplated situations which this survey indicates have not developed. Caution is suggested, however, in application of tuition aid to training which is already heavily subsidized by government. For this reason, it is recommended that:-

2. The Policy should not cover trainee expenses under the Occupational Training of Adults Program until the details of its application in the Public Service have been worked out.

The above recommendation is consistent with Treasury Board direction of July 5, 1967 that the requirement for prior Board approval of any application of the Technical and Vocational Assistant Act in the Public Service, would apply equally for the time being, to the Occupational Training of Adults Program (T.B. 545645 - Circular Letter 1959-12).

Two departments were of the view that training to complete high school education should not be reimbursed because this was an essential qualification to initial appointment.

The elimination of high school training from the Policy might cause some hardships and would not be consistent with outside practice. (See Appendix C). The United Kingdom, in particular, has had an aggressive program over a number of years of day-release of young adults to encourage completion of grade-school education. Authorities there are convinced this approach has paid big dividends.

It seems reasonable, however, that payments should not be made for training which an employee is specifically required to bring to the job at time of appointment, and it is concluded that this view should be included as a guidline in the announcement of any Policy revision.

Program Exemptions - Second Language

Reimbursement for English or French language training required to secure second language skill is not permitted under the Policy.

There was a majority view that this prohibition should be removed, apparently based on the inadequacy of Public Service Commission programs in serving individual department and agency needs at all locations.

In 54% of cases, comprising a number of major departments, the program was not meeting all needs, even in circumstances of the highest priority. Unsatisfied departments and agencies point out that it has not been possible for Public Service Commission language schools to accommodate all employees recommended for training, and that training requirements exist at locations where neither a language school nor other forms of Commission-sponsored training are available. This has created special difficulty for one agency which has major establishments at isolated points requiring a substantial and unfilled requirement for communication in the French language. It was also pointed out that previous lines of employee transfer and promotion, where skill in the French language is a requirement, now seem blocked to a degree by the unavailability of language training.

Departments and agencies propose that where Commission-sponsored language training is required, but not available, that employees be encouraged to undertake such training from outside sources. Some note that reimbursement of costs could be based on successful completion of proficiency tests approved by the Public Service Commission. A few departments are of the view that reimbursement should also be applicable to courses taken in a second language to reinforce skill where an employee has completed the highest level of training available through the Commission.

Removing the present bar against reimbursements for second language training (to which the Board has made a number of specific exceptions), could result in several thousands of employees in the Executive and Administrative Categories taking financially assisted training. To this could be added a number of additional thousands of employees in Categories to which a lower

training priority has been assigned. The net effect might be a weakening of the service-wide system of priorities; encouragement of waste; and unequal application of the Policy throughout the service, causing grievances. Coupled to this is the fact that "immersion-type" training is both the most effective and least available from private sources.

On the other hand, there is no compelling evidence that department and agency action, given the opportunity, would be any less responsible than for any other type of training activity. In addition, there remains the fact that insufficient Public Service Commission-based training will be available to meet needs in the near future. Accordingly, it is recommended that:-

3. The Policy be extended to include training in the English and French language, and that

4. The Public Service Commission be asked to -

   (a) advise departments and agencies on the availability and suitability of outside training courses,

   (b) provide any testing services required to assess employee capability and proficiency, and

   (c) assist the Board in developing detailed guidelines as the basis for effective and acceptable decision-making by the departments and agencies.

The substitution of guidelines for controls is consistent with the general approach being taken by the Board to a broad range of matters. Any guidelines developed should be sufficiently specific to serve as a basis for assessing department and agency performance.

Non-Working and Working Time

Apart from training by the correspondence method, this Policy applies only to training taking place in the evening, after normal working hours, on a regular work day.

About 89% of departments and agencies are of the opinion that the Policy should be extended to cover any time during which an employee is not normally required to work, pointing out that any other approach would be artificial and in some cases discriminatory. Departments not agreeing with this view (11%) have very limited employee participation and, in all but one case, have not experienced any difficulty.

Accordingly, it is recommended that:-

5. The Policy be extended to cover any training which takes place outside normal working hours.

Some 65% of departments and agencies do not believe that the Policy should contain provision for situations in which employees find it necessary to leave before the close of the normal working day in order to be on time for classes. An analysis of these replies shows that in half the cases, informal arrangements altering hours worked, permitting a limited amount of time-off, or requiring "make-up" time are in use. Other departments have up till now experienced no problem, probably as a result of limited employee participation.

A further 30% of departments and agencies would like to have the Policy contain some specific authority for such informally arrived at arrangements.

Since the majority of departments and agencies are satisfied on this point, and others have not reported any hardship, it is concluded that the Policy should not be changed at this time but that any general review of training requiring day-release should include re-examination of this question.

Prior Approval

The Policy provides that prior approval by management of proposed training is a required condition for subsequent reimbursement.

In all, 60% of departments and agencies agree that this requirement has been useful and 79% are of the opinion that it should not be changed. It was pointed out that the requirement for prior approval:

- Puts responsibility on the employee to seek approval and is an additional motivating factor as a result of persomal commitment. (Some departments feel the requirement discourages some employees.)

- Places management in the position of being able to advise employees on acceptability of the training for reimbursement, and the value of the training proposed. It also creates a situation in which a discussion of career development could take place.

- Permits funds for reimbursement to be earmarked in advance with certainty, and training plans to be developed from more timely information.

On the other hand, 11% of respondents reported that the requirement for prior approval of training made administration more difficult and there was a 15% view that the requirement should be changed. Apparently, some departments have rejected requests for approval of training in all cases falling after the date that training commenced and would like to see some flexibility in any revised Policy.

One department was of the view that the requirement should be made optional so that only those employees requiring re-assurance that the training being undertaken was acceptable for reimbursement need apply. Employees anticipating possible failure would not be reticent to undertake training if they knew that reimbursement would follow successful completion.

The Policy requirement for approval of training prior to commencement as a condition to subsequent reimbursement is supported by most departments and is consistent with outside practice. A minority, however, point to the injustice which is caused by a rigid interpretation of this requirement, which is characteristic of its application in several departments.

It is recommended that:-

6. Deputy heads be given latitude, in unusual circumstances to waive the requirement for approval of training before commencement as a condition of subsequent reimbursement.

It would be desirable to check on the number of such waivers for the academic year following implementation of the foregoing.

Payment on Conclusion

The Evening and Correspondence Course Policy provides that any reimbursement follow the conclusion of training. This is the outside practice (Appendix C).

Departments were by a large majority also of the view that payment should be made after completion of training (84%) and that it would not be an advantage to advance the entire payment before training starts (81%). Among the reasons almost uniformly cited for this view was the increased paperwork which would result and the difficulty and distastefulness of securing a refund where an employee has not successfully completed a course. A majority of respondents expressed the view that the present system provided a good incentive Several departments felt the fact the employee was meeting the initial cost was a good check on motivation.

The 19% of respondents favouring change offered a number of different reasons of which the most common was that no amount of assurance of reimbursement is as encouraging to the employee as the actual money in his pocket, particularly, in cases where the fee is high in relation to the recipient's salary. Some departments anticipate no difficulty in securing repayment where training is not successfully completed. One department points out that if an employee is directed to take training, he should not have to pay for it out of his own pocket, and another, that departments should have the flexibility to choose which approach to use.

Suggested alternative methods of administration included

- Advancing the full cost of tuition, recovering it by payroll deduction over a period of time, and reimbursing the employee some part of tuition costs following successful completion of the training.

- As above, but commencing recovery one month after conclusion of the course if not successfully completed and making no recovery if it is.

It is concluded that there is insufficient evidence to warrant a general change in the timing of reimbursement.

The Policy also requires that training be successfully completed as a condition of reimbursement. This is to be established by examination or an adequate attendance record.

Some 89% of departments and agencies believe this requirement should continue and a further 11% that it should be changed. Respondents suggesting no change believe that the requirement deters frivolous registrations and encourages a student to attend, to study, and to complete home assignments. One department felt that both satisfactory attendance and a passing mark on an examination should be required. Dissenting departments and agencies support the present Policy but feel that some flexibility should be introduced which would permit a payment where special circumstances have made successful completion impossible.

There have been a number of recent cases in which reimbursement was warranted but, owing to illness, or some other acceptable cause employees were not able to complete training. It is recommended that:

7. Deputy heads to be given latitude, in unusual circumstances, to waive the requirement that reimbursement be based on successful completion of training.

In this case, also, it is suggested it would be desirable to check on the number of such waivers for the academic year following implementation of the proposal.

Job-Related Requirement

The Policy applies to training which will "... contribute to increasing (an) employee's qualifications and performance in his work."

This was found reasonable by 62% of reporting departments and agencies, and in need of change by a further 35%. Very few respondents concurring in present policy gave their reasons. Some departments indicated the present policy guarantees a good return on the investment, and others that it permits clean-cut decisions on the reimbursability of proposed training.

Dissenting departments offered a wide variety of alternatives of which the most common were:

- Including training under the Policy which will meet a general future need in the Public Service as a whole, to avoid trapping a capable employee in a small agency.

- Removing the restriction that acceptable courses leading to a university degree be limited to those related to the job, as long as the degree, itself, is related to a clear job requirement.

- Including any training under the Policy related to legitimate career aspirations and to the broader aspects of career development.

- Including any training which forms a part of a formally developed departmental career plan, or which is consistent with the probable future career line of an employee.

- Including any academic training which will increase an employee's potential for advancement.

Since two-thirds of responses showed satisfaction with present job-related requirements, it could be concluded that the need for change is not broadly supported. In Part IV of this Report, however, it is noted that <u>at least</u> 15% of training reported was not acceptable within the present Policy requirement for job-relatedness. An examination of individual cases shows that the majority of such training originated with departments expressing satisfaction with the requirement. It is reasonable to suppose that were such training prevented, those departments now satisfied with Policy requirements would no longer be so. There is probably, in fact, a majority view for broadening of the Policy if current practice is taken into account.

The review of "Outside Practice", Appendix C, confirms the earlier view of the Treasury Board that reimbursable training should include the future as well as the present duties of an employee. Outside practice tends to adopt a more liberal interpretation of future duties than the requirement in the present Policy, which states:-

> "In exceptional cases, reimbursement may be extended to academic training related to future needs where these have been precisely identified and documented as a result of a thorough study of requirements and of the most economical alternatives available."

It is felt that the foregoing statement of Policy, which has the force of a regulation, is too narrow. The requirement for training against future needs is not exceptional and to treat it as such is to discourage planning training to meet these needs. Any exceptionality lies in the relative harshness of the further limitation of precise identification, documentation, and thorough study when compared to practice in the private sector.

It is recommended that:-

8. Training to meet both present and future requirements be made equally acceptable for reimbursement under the Policy.

If the foregoing recommendation is implemented, any guidelines issued should include advice on the requirement for identification and documentation of training needs.

Payment Scale - Level

The Policy provides for payment of up to 50% of tuition and examination fees following a course.

Departments and agencies were asked to consider the need for a change in the scale of payment and the grounds on which a payment scale should be based. Some 70% of replies, representing 84% of employees in the Public Service, proposed some form of change.

There was little feeling (3%) that the frequent industrial practice of scaling payments to employee salary should be followed. Similarly, there was limited agreement (3%) that reimbursement should be based on any part of training expenses as agreed to between employee and supervisor (i.e. individually negotiated).

About 16% of responses favoured the industrial approach of basing payments on examination marks, that is, increasing the percentage of reimbursement according to the grade obtained. Departments believing this approach has incentive value were quick to point out the difficulties resulting because some evening courses are not graded and grading systems vary; marking standards vary as does individual ability; and academic standing is not a fool-proof indicator of job performance.

Some 22% of responses indicated that rate of reimbursement might be based on the length of a program of study, that is, paying a progressively higher proportion of costs as each successive year of training in an extended program is completed. Departments and agencies favouring this approach felt it would have value in rewarding initiative and a heavy investment of time and effort, would encourage perseverance, and would be a desirable facet of a career program.

In addition to the foregoing alternatives, 27% of departments and agencies were of the view that the proportion of costs reimbursed should be based on the degree to which the training is related to an employee's job. Several departments pointed out this would constitute paying in proportion to value received. One department did not favour this approach because employees might ultimately benefit through advancement and this, more than a higher rate of reimbursement, should compensate.

Approximately one-third of responses also contained proposals for combinations or alternatives to the foregoing approaches. These almost uniformly recommended payment of full tuition and examination fees in the following circumstances

- Where there is no doubt about the need for the training.
- For all employees of high ability and potential for advancement.
- Where an employee has been directed to take the training, and 50% if not.
- For any training related in a general way to needs in the Public Service as a whole.
- For training which will fit a redundant employee for some other occupation, inside or outside the service.

A few departments were of the opinion that half of any amount to be reimbursed should be paid in advance of training commencing, to assist in the pre-payment of expenses, and that the other half should be paid following satisfactory completion of the training, as a reward for successful perseverance.

In summary, there was a 70% opinion (representing 84% of employees) that the fifty percent ceiling on reimbursement should be raised and that the expenses on which it is based should be broadened to include items besides tuition and examination fees. Respondents favouring change were unanimous in agreeing that the payment ceiling should be raised to 100% of allowable expenses.

The arguments for raising the reimbursement level to 100% include the following:-

1. Evening and Correspondence Course training does not involve much working-time and is the least expensive available to managment. (Learning efficiency is, of course, lower).
2. Where an employee takes short-term training on a full time basis during the day, all expenses are paid, even for courses of several months' duration away from headquarters. The same training taken in the employee's free time during the evening is reimbursed only at the rate if 50% of tuition and examination fees. (It should be noted that full-time training is on the average much more closely job-related.)

3. This is already the practice for evening correspondence training which is closely job-related and of an urgent character, such as in accounting, for example. (See Appendix E.)

4. Paying full expenses is becoming a common practice in Canada and the U.S.A., particularly, in larger American organizations. (See Appendix C).

The proposal of departments and agencies to raise the reimbursement ceiling to 100% seems reasonable in view of internal practices, available external evidence, and the economical character of the training involved. Accordingly, it is recommended that:

9. Reimbursements under the Policy be permitted of <u>up to</u> 100 percent of allowable expenses.

<u>Payment Scale - Scope</u>

The Policy would limit application of the above change to fees for tuition and examination. A number of departments feel that the basis on which any payment is calculated should be extended to include registration and other fees, tuition charges, and the costs of textbooks, which frequently are a significant training expense.

The principle arguments for widening the basis on which a payment is calculated include:-

1. Removing the anomaly of kind of training. It is the standard practice in the service to pay all the above-listed charges if comparable training is taken <u>during</u> working hours.

2. Conforming to the general approach in outside practice among larger employees. (See Appendix C).

3. Levelling differences in treatment where almost identical training has been taken at different institutions. One separate billing may be simply for tuition costs, which is allowable, or include all or any combination of registration fees, course materials, books, etc.

It is recommended that:-

10. The basis on which payments are calculated include registration, tuition, examination and laboratory fees; course materials, when billed for by the teaching institution; and textbooks prescribed as essential to the training.

Payment Scale - Rate

Such changes should not result in the full payment of all allowable training expenses in every case, nor is it the wish of 92% of responding departments and agencies. For this reason, criteria will be required to distinguish between varying rates of reimbursement.

Departments and agencies considered a range of outside practices such as scaling payment to employee salary, examination mark obtained, length of study program, relevance of training to duties and various combinations of these approaches. None found majority favour, but most were felt to have some use.

While there was no majority view on how payments should be scaled, some 27% of responses favoured making distinctions on the basis of the degree to which training taken relates to duties, and a further 8% favoured this approach in combination with some other variant. Basing level of reimbursement on the relevance of training to the work of an employee, is another way of saying it should be based on the extent to which the organization expects to benefit from the increased capability of the employee following training. This is the most common method used in outside practice (See Appandix C).

Every degree of benefit to the organization and, therefore, of reimbursement, is hypothetically possible. Practically speaking, such fine distinctions can only be made with difficulty. In normal circumstances, no payment, 50% payment, or 100% payment are about the maximum differences distinguishable. (Two departments were of the opinion that no distinctions could be made.)

At lease an interim answer seems to lie in an approach which combines together the probability and extent to which the organization will benefit through an employee being trained, with the need for administrative simplicity, and the assumption that training to meet non-specific future needs will, on the average, be of considerably less benefit in relation to costs.

Accordingly, it is recommended that:-

11. Full reimbursement of allowable expenses (Recommendation 9.) be permitted under the Policy for training which is taken:-

    (a) to improve an employee's productivity in his present work, or

    (b) to fit an employee to perform additional or alternative duties to be assigned following training.

12. Reimbursement at the rate of 50% be applied to training to better fit an employee to meet non-specific (career-centered) needs in the service.

The above approach is believed to be fully consistent with outside practice by larger employers having well-established training and development policies.

In any guidelines issued on the Policy it should be made clear that costs should not be reimbursed for training under Recommendation 12 which are not related to the general needs of the service and to the reasonable career aspirations of the employee.

Two particular training situations which, at first glance, might appear to continue to require special treatment have in fact been provided for in Recommendations 11 and 12. The first of these relates to special authorities which have been given for full reimbursement of accounting and other similar training (Appendix E). Since much training involves a specific future requirement, is closely job-related, and of an urgent character, it is covered under Recommendation 11(b). Similarly, training to fit an employee, becoming redundant, for alternative employment is also covered. If the training is organization-initiated and centered on alternative duties which have been planned for, Recommendation 11(b) would again apply. Otherwise Recommendation 12 is applicable.

## Miscellaneous

The following miscellaneous matters have been sources of irritation to departments and require correction.

## Records Maintenance

At the time the Policy was introduced in 1964, departments and agencies were asked to maintain specific records of employee participation for subsequent audit by staff of the Board. While there has been almost uniform recognition of the need for information to support management of the Policy, very few such records maintained have included all, or only the information required by the Board.

Since the future needs of the Board for post-audit are difficult to predict and the requirements of departments have so far proven at variance, it would appear more realistic to detail information required with appropriate advanced warning when a further study is to be made.

It is concluded that the present requirement for maintenance of records should be eliminated but that departments and agencies be encouraged to maintain whatever records are necessary for management of the Policy.

Employee Transfers and Resignations

Since inception of the Policy, a number of cases have arisen in which an employee has commenced approved training at the beginning of an academic year while employed by one department or agency and then transferred to another. Where such training has subsequently been completed, there have been differences in view as to whether or not the training should be reimbursed and, if so, as a charge to which jurisdiction.

In addition to the administrative reasons for insisting that training under the Policy require prior approval, is the desire to let employees know that their endeavour toward personal improvement will be recognized by reimbursement of costs following successful completion of such training. This has been viewed by the Board as a commitment to the employee. The department or agency benefiting is the one in which the employee works following the training.

It is concluded that where an employee, who has transferred in the service, successfully completes training which was previously approved, reimbursement should be made by the then employing department or agency.

It is also concluded that where an employee resigns before reimbursement is approved, that none should be made under this Policy. There would be no benefit to the service for the training taken.

# PART IV

## POLICY MANAGEMENT

During the intervening four years since the Evening and Correspondence Course Policy was announced, sufficient time has elapsed for the pattern of Policy management to emerge and become fixed in individual departments and agencies.

This Part contains information on the way in which the Policy is being administered, followed by an assessment of the extent to which the more important Treasury Board expectations at the time the Policy was introduced have been met, and some evaluation of administrative steps taken by the departments and agencies. Only a few key elements are reported on.

## A. SURVEY FINDINGS

### Administrative Direction

Some 82% of departments and agencies have at some time issued special written instructions to supervisors on the Evening and Correspondence Course Policy and 65% have a departmental form for the purpose.

These instructions appear to have been issued on a single-time basis in most cases. About 15% of departmental reports show that information about the policy forms part of a current procedures manual or other readily accessible source. In addition, a further 11% of departments and agencies have taken special steps in the academic year 1966-67 to again focus employee attention on provisions of the Policy.

### Proposal Initiation

About 51% of correspondence and evening course training under the Policy was initiated by the employee and a further 16% by his immediate supervisor. The remaining 33% was initiated at some level above this as a part of a centrally-organized training program.

Course Approval

Approximately 30% of departments and agencies approved both the taking of training and reimbursement of costs, at the same time, following the conclusion of training. The senior authorizing level is normally a line officer responsible for operating programs in 60% of cases, and a staff personnel adviser in the remaining 40%. In the case of departments and agencies having offices outside headquarters, about 25% have delegated authority to local components to authorize reimbursement for training under the Policy.

Determination of Need

Departments and agencies report that the responsibility for determining the need for training was about equally divided between the immediate supervisor (52%) and some higher level of direction (48%). Techniques used to determine needs included manpower inventory (5%), surveys (13%) and formal employee appraisals (28%). The remaining 46% of training needs appear to have been determined by discussion between employee and supervisor.

Training Benefits

Approximately 5% of departments and agencies surveyed have undertaken steps to relate training costs to benefits. A further 16% have indicated the intention to make special studies in this connection. Some 8% are of the opinion there is no way of relating training costs to benefits. Several departments felt it was too soon since introduction of the Policy for an examination of benefits.

In response to a direct question, 30% of departments and agencies replied that there was some evidence that introduction of the Evening and Correspondence Course Policy had increased individual productivity. Such evidence as exists is based on the opinion that training taken under the Policy has resulted in significant improvements in quality of work at the junior entry levels of employment.

One larger department was of the view that the amounts paid were very small in relation to the dividends through recognizing employee achievement and through encouraging self-development. Almost all departments and agencies expressed confidence that the expense of training taken under the Policy was justified by the return to the organization.

Policy Interpretation

Department and agency reports show that, where written instructions were issued (82% of cases), one-third took the form of transmitting Treasury Board Minutes and Circulars and the other two-thirds more extensive explanatory releases. The results of a review of the text of these releases is included in Table VI.

In seven key areas selected for review the highest correct coverage of an item was 75%, erroneous coverages ranged up to 80%, and one area was not covered in 75% of directives. Below appears a list of the more common errors in directives:

- failure to recognize that the policy does not apply to French or English language courses, not simply to those offered by the Public Service Commission.

- either not considering training to meet future needs, or considering it on the basis of non-specific employee-centered career development wishes, instead of as required to meet precisely identified future needs.

- ignoring the requirement that a deputy head or his delegate must request the employee to undertake the training.

- presuming that reimbursement should be at a flat rate of 50 percent instead of "up to 50%".

- basing reimbursement on tuition fees only instead of including examination fees, where applicable.

TABLE VI

Extent to Which Key Details of Treasury Board Directions
Were Covered and Interpreted Correctly by Responding Departments and Agencies

| Specific Policy Details | Covered Correctly | Covered Incorrectly | Not Covered |
|---|---|---|---|
| Training Not Covered by Policy - Originally | 75% | 25% | - |
| - As Amended | 75 | - | 75% |
| Relationship of Training to Present Duties | 70 | - | 30 |
| Relationship of Training to Future Duties | 30 | 20 | 50 |
| Training Proposals be Initiated by Management | 15 | 60 | 25 |
| Need for Course Completion or Satisfactory Attendance | 60 | - | 40 |
| Payment Rate (up to) 50% | 20 | 80 | - |
| Payment Based on Tuition and Examination Fees | 45 | 55 | - |

Policy Application

In the preceding paragraphs dealing with policy interpretation, the existence of incomplete and inaccurate policy direction within departments and agencies was examined. This has probably had a significant effect on the kind and amount of training for which reimbursement has been made.

Under present Policy, reimbursement

- is restricted to training which contributes to increasing an employee's qualifications and performance in his present work or in exceptional cases, to future needs which have been precisely identified, and

- should not cover prerequisite or optional courses unrelated to the foregoing.

The data in Table V (page 9 ) show that about 85% of reimbursed training may fall within the foregoing limitations, but that the remaining 15% of training to meet "General Requirements" probably does not. Appendix D contains a selection of examples drawn from 13 different departments and agencies which tends to support this conclusion.

"The "General Requirements" type of training was found the least frequent for the Scientific and Professional Category (10%) and most frequent for the Administrative Support Category (21%). Approximately half such training was secured through universities.

## B. DISCUSSION AND CONCLUSIONS

### Increased Programming

In addition to the expectation that issuance of a permissive policy of correspondence and evening course training would stimulate employee participation, the Treasury Board hoped that the development of long-term departmental training programs would be encouraged by placing an increased measure of authority in the hands of deputy heads to approve training without referring individual cases to the Treasury Board.

Discussion following the survey has verified that centrally stimulated training has been the result in 11% of departments and agencies. The majority of the remaining respondents were of the opinion that the change was too small to have any great effect in encouraging planning and programming. A number of larger departments noted that other steps taken by the Board, in particular, the Annual Training Submission approach, has had considerably greater effect in securing improved management of training.

It is concluded that general efforts made by the Board to improve the organization and programming of training and development should continue.

### Needs and Benefits

Expectations that greater use would be made of techniques for determining training needs and evaluating training benefits, have been met in only a few instances. Departments and agencies emphasized, in this case also, that both the potential application and the current usage of training under the Policy is too modest to warrant special attention for the time being.

The logic of not taking special steps in these circumstances would be compelling, if supported by evidence that decisions made in individual cases are acceptable under the Policy. Put in another way, there should be evidence that individual training proposed is needed by the organization as well as the employee, and that training taken has benefited the organization in proportion to its cost.

This evidence is not available. Departments were asked to indicate, for each of the 3521 cases reported on, why training was approved and in what way it was expected that training would increase productivity on the job. Only 14% of departments and agencies were able to provide sufficient information for a confident assessment to be made of the relationship between training proposed and departmental need. A further 72% provided a limited amount of information, usually a few words, but insufficient to permit an assessment to be made. (See Appendix D for some typical examples.) An additional 14% were not able to provide any information. This included several larger departments and agencies.

It has already been noted that only 5% of departments had made any formal assessment of training benefits.

In summary, it appears that all but a few departments and agencies have not instituted adequate systems of information collection and analysis to support need determination and benefit assessment. Further, that the modest amount of training going on under the Policy in itself, is not sufficient to justify establishment of sophisticated systems for the purpose.

It is concluded that the best way of securing improvement in need determination and benefit assessment is by a general upgrading of training and development management in departments and agencies across the service.

Policy Administration

At the time the Policy was established in 1964, the Board also expected that departments and agencies would put into effect an efficient system for its administration. Among the elements expected to be developed were:

- a clear and accurate outline of the Policy, to be made available to employees.

- procedures for administration of the Policy which would provide for timely and accurate decisions made at the lowest level appropriate to the organization.

- interpretation and application of the Policy consistent with Treasury Board Directives.

Following publication of the Policy in early 1964, all but a few departments and agencies reacted swiftly to make information available to all employees and supervisors and since that time coverage has become almost complete. A few departments have issued directions of very high quality, which in two cases are bilingual. Unfortunately, much of the information issued by the majority was in some respect inaccurate, or incomplete. Too much time has elapsed to ascertain the original source of these difficulties.

The current level of participation under the Policy would probably have been considerably increased, with concomitant benefits, had the majority of departments and agencies developed methods to keep the opportunities presented before the eyes of supervisors and employees. This has been done in only a small number of cases, (11%). (See Recommendation 1).

Departments and agencies, similarly, quickly developed procedures for administering the Policy. Survey evidence and subsequent discussion indicates that these are operating efficiently. Nevertheless, over half of training proposals are still initiated by employees, and delegation to approve such training has only been made in exceptional cases below the level of a senior line officer heading a major organizational component. Paradoxically, in cases of limited delegation, authority most frequently rests with an intermediate staff officer in a personnel division at headquarters.

It is concluded that departments and agencies should be encouraged to delegate responsibility to administer the Policy.

Failure of a number of departments to correctly interpret or apply Treasury Board policy is of critical significance. For some time planning has been underway to relax controls over training expenditures and to substitute permissive guidelines. The essence of such an approach is that the Board can count on departments and agencies:

- to use good judgment in decisions on training, and

- to keep within any limits on authority to take action.

The evidence from this survey shows that performance in managing the Policy has varied widely from department to department, and agency to agency.

It is not suggested, however, that action to alter the Policy be deferred until average performance meets minimum expectations. This could take some time and would have the effect of penalizing present high performance without creating an obvious incentive for improvement, where it is required. The answer then lies in adopting the same approach as in other areas of training and development - authorizing desired changes when individual departmental performance reaches minimum expectations.

It is recommend that:-

13. Any liberalization in the existing Policy should not be applied on a service-wide basis, but selectively, to individual departments and agencies, as a program of management is proposed which is acceptable to the Board.

RWH/ams/hw

## PART V

## LIST OF RECOMMENDATIONS AND CONCLUSIONS

Recommendations - (Substantive changes)

1. Future direction given by the Board on the Evening and Correspondence Course Policy should encourage wider publicization of the opportunity provided to employees for self-improvement. (Page 12.)

2. The Policy should not cover trainee expenses under the Occupational Training of Adults Program until the details of its application in the Public Service have been worked out. (Page 14.)

3. The Policy be extended to include training in the English and French language, (Page 16.) and that

4. The Public Service Commission be asked to -

   (a) advise departments and agencies on the availability and suitability of outside language training courses,

   (b) provide any testing services required to assess employee capability and proficiency, and

   (c) assist the Board in developing detailed guidelines as the basis for effective and acceptable decision-making by the departments and agencies. (Page 16.)

5. The Policy be extended to cover any training which takes place outside normal working hours. (Page 17.)

6. Deputy heads be given latitude, in unusual circumstances, to waive the requirement for approval of training before commencement as a condition of subsequent reimbursement. (Page 18.)

7. Deputy heads be given latitutde, in unusual circumstances, to waive the requirement that reimbursement be based on successful completion of training. (Page 19.)

8. Training to meet both present and future requirements be made equally acceptable for reimbursement under the Policy. (Page 21.)

9. Reimbursements under the Policy be permitted of up to 100 percent of allowable expenses. (Page 23.)

10. The basis on which payments are calculated include registration, tuition, examination and laboratory fees; course materials, when billed for by the teaching institution; and textbooks prescribed as essential to the training. (Page 24)

11. Full reimbursement of allowable expenses (Recommendation 9.) be permitted under the Policy for training which is taken:-

    (a) to improve an employee's productivity in his present work, or

    (b) to fit an employee to perform additional or alternative duties to be assigned following training. (Page 24.)

12. Reimbursement at the rate of 50% be applied under the Policy to training to better fit an employee to meet non-specific (career-centered) needs in the service. (Page 25)

13. Any liberalization in the existing Policy should not be applied on a service-wide basis, but selectively, to individual departments and agencies, as a program of management is proposed which is acceptable to the Board. (Page 34)

Conclusions - (Other suggestions)

- no change should be made in the basic eligibility of all employees for assistance under the Policy. (Page 13.)

- payments should not be made for training which an employee is specifically required to bring to the job at time of appointment, and this view should be included as a guideline in the announcement of any Policy revision. (Page 15)

- the Policy should not be changed at this time but that any general review of training requiring day-release should include re-examination of this question. (Page 17)

- there is insufficient evidence to warrant a general change in the timing of reimbursement. (Page 19)

- the present requirement for maintenance of records should be eliminated but that departments and agencies be encouraged to maintain whatever records are necessary for management of the Policy. (Page 25)

- where an employee, who has transferred in the service, successfully completes training which was previously approved, reimbursement should be made by the then employing department or agency. (Page 26.)

- where an employee resigns before reimbursement is approved none should be made under this Policy. (Page 26)

- general efforts made by the Board to improve the organization and programming of training and development should continue. (Page 32)

- the best way of securing improvement in need determination and benefit assessment is by a general upgrading of training and development management in departments and agencies across the service. (Page 33)

- departments and agencies should be encouraged to delegate responsibility to administer the Policy. (Page 34)

# APPENDIX A

## PRESENT EVENING AND CORRESPONDENCE COURSE POLICY

### History

Prior to the Spring of 1964, Policy on payment of evening and correspondence course fees required, with few exceptions, that individual cases be submitted to the Treasury Board whenever the total tuition fee exceeded $600 or the duration of the training period exceeded two weeks (524534). This meant, in practice, that almost all such training required prior approval.

In dealing with such proposals, the Board would approve reimbursement contingent on successful completion of a course by the employee, where the training was job-related, at the rate of

- 50% where there was evidence that this was the comparable outside practice for the particular training involved.

- 100% where there is evidence of recruiting difficulty or problems in securing adequate efficiency.

Reimbursement at the 100% level was, in practice, confined to a few requirements related to accounting. Recipients of aid were required to refund any money received if they left the public service within two years of completing training (617508).

### Present Policy

On March 6, 1964 the Treasury Board approved a partial relaxation of control based on a survey which had recently been completed by the Department of Labour (620135). This study, which covered all forms of tuition aid to approximately 2¼ million employees in Canadian industry, showed:-

1. Approximately 39% of all employees in the companies surveyed were covered by tuition reimbursement programs. The survey sample, which was strongly biased towards blue-collar workers reported relative participation rates for office and non-office employees at 60% and 34% respectively.

2. Where a company tuition aid program existed, the rate of reimbursement applicable to employees was -

| Rate of Payment | Percent of Employees |
|---|---|
| Under 50% | 11% |
| 50% | 54% |
| 75% | 7% |
| 100% | 28% |
| | 100% |

3. Successful completion of the training was a prior condition of tuition reimbursement for 92% of all employees covered.

The new Evening and Correspondence Course Policy, outlined by T.B. Minute 620135, authorized deputy heads to approve payment of up to 50% of course and examination fees where

- the course is related to the employee's duties
- there is reasonable assurance that the course "should contribute to increasing the employee's qualifications and performance in his work"
- the employee has been requested to take the course, and
- either the related course examination has been passed or, where there is no examination, attendance has been satisfactory.

This authorization was not to apply to vocational training courses, courses covered by the National Health Grants Program, to English or French Language training courses, or to in-service courses sponsored by the Public Service Commission or other government agencies.

There follows quotations from the significant parts of relevant authorities.

A. T.B. Minute 620135 (as amended) of March 6, 1964.

"The Board

(1) approves that a deputy head may authorize the reimbursement of up to 50% of the tuition (including examination) fees incurred by an employee of the Public Service who undertakes an evening or a correspondence course, other than an English or French language training course or a course referred to in paragraph (2), when the deputy head

(a) prior to the course

(i) is satisfied that the course if related to the employee's duties;

(ii) is reasonably assured that the course should contribute to increasing the employee's qualifications and performance in his work;

(iii) has requested the employee to take the course;

(b) on completion of the course certified that

(i) the employee has successfully completed the examination; or

(ii) where the course does not call for an examination, that the employee has had reasonable attendance at the course; or

(iii) where the employee has missed the first examination, he has successfully completed a second examination, except that in such instances, the additional examination fee, if any, shall be paid by the employee;

(2) directs that the following courses be excluded from paragraph (1):

(a) vocational training courses covered by the provisions of the Technical and Vocational Training Assistance Act;

(b) courses covered by the provisions of the National Health Grants Programme; and

(c) in-service language and other courses sponsored by the Civil Service Commission or other governmental agencies."

B. Circular Letter 1964-15 of April 6, 1964

"At its meeting on March 6, 1964, the Board considered the results of a general survey conducted by the Department of Labour on the industrial practice of subsidizing evening and correspondence courses for employees. At the same time, the Ministers examined the degree to which this practice could be extended to the Public Service and deputy heads given the necessary authority to reimburse, under certain conditions, employees who attend evening courses or follow correspondence courses.

The survey indicated that the predominant practice in companies that have formal programs is to reimburse up to 50% of tuition fees incurred by employees who successfully complete academic or technical courses (other than courses under the provisions of the Technical and Vocation Training Assistance Act) taken in the evenings or by correspondence outside of normal working hours.

While noting and agreeing with the legitimate desire that exists to increase, where and when required, the qualifications of employees, their efficiency, and the general calibre of performance in departments, the Ministers felt that an appropriate administration machinery and internal controls suitable to the organization of each department should be established in order to enable the goals of efficiency contemplated by the attached authority to be reached and at the same time to keep the costs within reasonable limits. You will, therefore, note that the attached Treasury Board Minute stipulates certain conditions that must be met before and after a course in order that reimbursement may be made. Deputy heads will, no doubt, wish to bear these criteria in mind when considering implementation of this authority and the extent and manner in which they are prepared to delegate authority to their field offices.

The Board also expects that, as should be done for any training program, decisions in this field will be preceded by an appropriate inventory of manpower, skills and exploration of alternative and other economical means of increasing efficiency, bearing in mind at all times that training is a means to an end and not an end in itself. Also, before authorizing such courses, departments should ensure that similar courses are not already available within the service.

The Ministers are also interested in obtaining periodic reports to assist them in evaluating the financial and managerial implications of this policy. They may also ask officers of the Board to conduct reviews of departmental practices in this field as they are developed. Departments are therefore asked to keep readily available records which when requested would show:

1. the name and classification of employees undertaking evening or correspondence courses;

2. a brief outline of the employee's duties and reasons for training;

3. the working place of employees;

4. the identification of the course;

5. the identification of the institution where the training is undertaken;

6. the amount of money reimbursed for each course authorized and undertaken."

C. Circular Letter 1964-45 of September 23, 1964

"A significant consideration which led the Board to approve this delegation was a desire to encourage the development of training programs by placing a measure of prior authority in the hands of Deputy Heads. This would permit more certain planning to meet staffing requirements. In larger departments, management of such programs would require the development of administrative machinery not only to review individual applications of this delegation but also to assess training requirements generally. The Board does not expect that the review of individual training requirements would, in the majority of cases, be a matter requiring the personal attention of Deputy Heads, provided that alternative arrangements have been made designating another appropriate officer to reach such decisions.

This will confirm the intention that Deputy Heads may approve reimbursement for evening courses which form a regular part of a university syllabus, or which are offered as extension courses, and which will contribute to an employee's qualifications and performance in his present work. In exceptional cases, reimbursement may be extended to academic training related to future needs where these have been precisely identified and documented as a result of a thorough study of requirements and of the most economical alternatives available. Where a program of study involving several courses is contemplated, financial support should not be extended to prerequisite or optional courses which cannot be reasonably related to the requirements of the incumbent's work.

The foregoing approach is equally applicable to all other forms of evening and correspondence training which might be considered for reimbursement.

For administrative purposes the word "course", where used in T.B. 620135, should be interpreted as meaning a unit of instruction for which an individual tuition and examination fee may be determined."

## APPENDIX B

Percent Response by Departments and Agencies to an Opinion Survey on the Present Policy

| No. | Question Details | % Response |
|---|---|---|
| 1 | SECOND LANGUAGE SKILLS - Tuition reimbursement for language training in English and French has not been provided for under this Policy. Should this be changed? | |
| | (a) Should be changed | 57 |
| | (b) Should not be changed | 40 |
| | No opinion | 3 |
| 2 | NON-WORKING TIME - The present Policy applies only to courses taken in the evening. Should this be changed? | |
| | (a) Should not be changed. | 11 |
| | (b) Should be extended to any time during which the employee is not normally required to work | 89 |
| 3 | TIME OFF - This Policy is not intended to include training during normal working hours. However, there are situations in which employees must leave work before normal closing so as to be on time for beginning of evening classes. Does the Policy meet this situation adequately? | |
| | (a) Policy is adequate | 65 |
| | (b) Policy requires revision | 30 |
| | No opinion | 5 |
| 4 | RELATION TO JOB - This Policy applies to training which the deputy head is satisfied will "...contribute to increasing (an) employee's qualifications and performance in his work." Is this requirement reasonable? | |
| | (a) Policy is reasonable | 62 |
| | (b) Policy should be changed | 35 |
| | No opinion | 3 |
| 5 | PRIOR APPROVAL - Prior approval of proposed training before commencement of instruction is a required condition for reimbursement. Has this requirement made it easier to administer the Policy? Should this requirement be changed? | |
| | (a) Made administration easier | 60 |
| | (b) Made administration more difficult | 11 |
| | No opinion | 29 |
| | (c) Should be changed | 16 |
| | (d) Should not be changed | 79 |
| | No opinion | 5 |

| No. | Question Details | % Response |
|---|---|---|
| 6 | OTHER EXEMPTED TRAINING - Courses covered by provisions of the Technical and Vocational Assistance Act and the National Health Grants Program have been excluded for reimbursement under the Policy. Should these exemptions be continued? Should there be other exemptions? | |
| | (a) Should be continued | 54 |
| | (b) Should not be continued | 8 |
| | No opinion | 38 |
| | (c) Should be other exemptions | 3 |
| | (d) Should not be other exemptions | 14 |
| | No opinion | 83 |
| 7 | SCOPE OF APPLICATION - The present Policy applies equally to all employees. Have you excluded any class, grade, or level of employee? Do you think any exclusions should be made? | |
| | (a) Have excluded some employees | 8 |
| | (b) Have not excluded any employees | 92 |
| | (c) Exclusions should be made | 11 |
| | (d) Exclusions should not be made | 86 |
| | No opinion | 3 |
| 8 | PAYMENT OF REIMBURSEMENT - The Policy provides for payment of tuition fees following conclusion of training. Should there be a change in the timing of reimbursement? Would there be an advantage in advancing the costs of tuition to an employee and recovering the amount if training is not successfully completed? | |
| | (a) Should be changed | 16 |
| | (b) Should not be changed | 84 |
| | (c) Would be an advantage | 19 |
| | (d) Would not be an advantage | 81 |
| 9 | EXAMINATIONS AND ATTENDANCE - The Policy requires successful completion of examinations or satisfactory attendance at a course as the basis for reimbursement. Should this be changed? | |
| | (a) Should be changed | 11 |
| | (b) Should not be changed | 89 |

10 PAYMENT SCALE - This Policy provides for payment of up to 50% of tuition and examination fees. The following are some variants used in government or industry elsewhere. Please indicate your agreement or disagreement.

| | Agree % | Disagree % | No opinion % |
|---|---|---|---|
| (a) Employee Salary - Scale payment according to employee's salary | 3 | 97 | - |
| (b) Examination Marks - Graduate payment according to the examination mark received. | 16 | 81 | 3 |
| (c) Course Length - Increase proportion paid according to length of course | 22 | 78 | - |
| (d) Job Relevance - Base proportion paid on the varying relevance of training to the job | 27 | 70 | 3 |
| (e) Incentive Quality - Base payment on the minimum necessary to motivate the employee, as determined by negotiation | 3 | 94 | 3 |

| | YES | NO |
|---|---|---|
| (f) Do you have any variants of your own for consideration? | 32 | 68 |

11 GENERAL - Do you have any evidence that this Policy has contributed to increased individual productivity in your department?

| | |
|---|---|
| (a) Have evidence | 30 |
| (b) Have no evidence | 70 |

N.B. Text of questions considerably shortened from the original Questionnaire.

## APPENDIX C

## OUTSIDE PRACTICE

A review of available literature* on the operation of tuition reimbursement programs outside the Canadian federal public service, in Canada and the United States of America, shows that the general outline of present federal policy on evening and correspondence course training is roughly in accord with average practice. (See Appendix "A" for a description of present policy).

Below is a brief summary of the results of this review.

Program Management - The operation of educational assistance programs is normally in the hands of personnel divisions, but approval of aid is shared between immediate supervisor (63%) and higher line management (57%) (1).

Personnel Eligible - The majority of outside tuition aid programs apply to all staff (1, 4, 9, 10, 11, 13). The most common exceptions are temporary and part-time employees, hourly paid employees and those having less than one year of service (1, 11, 13). Length of service is not an important factor where long-term training is involved (9). Hilgert (4) reports that there is evidence that restraints on eligibility are being reduced.

Admissible Training - Any form of training appropriate to the need seems acceptable (1, 2, 9, 10). Two studies (1, 2) report that highschool training is accepted by about half the companies surveyed.

Administrative Methods - Management approval of training before it commences is an almost uniform requirement (1, 2, 4, 6, 11, 13) and securing a passing grade is a prior requirement to reimbursement in over 70% of programs reported on (1, 2, 3, 4, 5, 11, 13). This means that payment can only take place following completion of training. One study reports 23% of programs provide for advanced payment in cases of hardship (11).

Job Requirements - Evidence available in the literature suggests that over 70% of tuition aid programs require that training be related to the present work of employees. An additional 17% ( 2), 43% (4), 57% (1) and 92% (10) of programs are reported to permit training against future job requirements.

According to Black (1), existing limits are being given increasingly more "liberal" interpretation. Seybold (10) notes a considerable increase in the past ten years in the number of programs which have been broadened to include training for future responsibilities.

Contrary to the findings of Black, Seybold also noted an increasingly more precise interpretation being given to the characteristics of acceptable future training and that the majority of programs supporting university training exempt individual courses from reimbursement if not related to present or future job requirements even though the degree, itself is relevant or acceptable.

*See attached Bibliography.

Payment - The basis for payment under all tuition aid programs reported on includes tuition fees as the main item. Black (1) reports that company programs include registration fees 65%, laboratory fees 50% and books 44%. Sweeney (11) reports 37% of company programs include other items besides tuition fees and Seybold (10) arrives at about the same figure.

The rate of reimbursement under company programs is variously reported in the literature, as follows: -

| Percent Reimbursement | Percent of Employees or Company Programs by Author (1) | (2) | (3) | (4) | (5) | (7) | (10) | (11) | (13) |
|---|---|---|---|---|---|---|---|---|---|
| Under 50% | - | 1% | - | - | - | 1% | - | - | 1% |
| 50% | - | 46 | 47% | 30% | 80% | 39 | 23% | 21% | 20 |
| 51-74% | - | 3 | - | - | - | 3 | 7 | - | 2 |
| 75% | - | 8 | 5 | - | 10 | 5 | 27 | 10 | 13 |
| 76-99% | - | 3 | - | - | - | 2 | 7 | - | 6 |
| 100% | 80% | 26 | 37 | 32 | 10 | 47 | 30 | 39 | 34 |
| Other* | 20 | 12 | 11 | 38 | - | 3 | 6 | 30 | 24 |
| No Information | - | 1 | - | - | - | - | - | - | - |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

*"Other" programs usually range from 50% reimbursement and up with rate based on such things as length of service, examination mark obtained, etc.

Studies by the Canada Department of Labour (3) in 1963 and the Civil Service Commission (2) in 1965 are of significance in considering policy for the federal government. These reports show no discernable trend though Hilgert (4) is of the view that programs in the U.S.A. have become more generous over the past number of years. This is borne out by two studies of the N.I.C.B. in 1956 (7) and 1964 (10) which have some comparability.

Seybold (10) also shows that the proportion of expenses reimbursed is less in smaller organizations.

There is an indication that levels of reimbursement in Canada are below those in the U.S.A.

Training Needs and Benefits

One of the central and unresolved issues in the literature is the failure of management to insist that training be based on need and that periodic examinations be made of the benefits that have accrued through tuition aid programs. Hilgert (4) reports that only 7% of companies studied had actually undertaken any form of benefit assessment. (This compares to the 5% of departments and agencies found in this study).

There is a common thread of agreement in the literature that more attention should be paid to the job relatedness of training before it is undertaken, and to cost/benefit analysis following its conclusion. (4, 10, 13).

Miscellaneous - A Canadian study (2) reports that the average spent in tuition aid per employee in the private sector in 1965 was $3.88 and an American study (6) that the average participation level per company in the private sector was 3%. Relative figures in this study are $.77 and 1.7% but should not be compared because of variation in base.

In dealing with U.S. and Canadian governmental and industrial practices, Saunders (9) reports that time-off for training purposes is allowed in the majority of cases.

## Bibliography

(1) Black, F.H. Jnr. Educational Assistance Programs: A Survey of Company Practices Training and Development Journal, December 1967, 42-46.

- 500 randomly selected members of A.S.T.D.

(2) Civil Service Commission (Canada) Employee Benefits in Industry and in the Public Service of Canada December 31, 1965. Ottawa, Ontario: Pay Research Bureau, Civil Service Commission, February 1967 (Privileged Document).

- 188 Canadian establishments employing 207,000 office workers.

(3) Department of Labour (Canada). Working Conditions in Canadian Industry Ottawa, Ontario: Economics and Research Branch, Department of Labour, Report No. 7, 1963.

- 682,000 Canadian office employees.

(4) Hilgert, Raymond. Tuition Aid Programs: Company Investment or Largesse? Training and Development Journal, February 1967, 24-34.

- 75 firms in the greater St. Louis Area.

(5) Jardine, A.S. Rates at Which Canadian Organizations Reimburse Employees for Tuition Fees. (Private Communication by Author) September 1967.

- 6 major Canadian companies headquartered in Quebec.

(6) National Home Study Council. Tuition Reimbursement Programs. Washington, D.C.: National Home Study Council, 1961? 8 pages.

(7) National Industrial Conference Board. Tuition-Aid Plans for Employees. New York, N.Y.: National Industrial Conference Board, Studies in Personnel Policy No. 151, 1956.

(8) O'Neill, I.M. How Business Helps Finance Employee Education. Canadian Business, May 1962.

(9) Saunders R.W. Policies Toward Educational Leave and Course Standardization. Public Personnel Review, January 1968, 17-22.

- 45 Provincial and State Governments and 35 Canadian and American cities.

(10) Seybold, Geneva. What's New in Tuition Aid Plans? Conference Board Record, January 1964, 15-23.

- 60 representative U.S. companies.

(11) Sweeney, T.M. Industry Reimbursement Policies Scranton, Pennsylvania: Final Report PA 67-44, Marketing Research and Planning, International Correspondence Schools, September 1967.

- 990 U.S. companies of all sizes.

(12) Villaume, J.C. Making the Most of Training Opportunities. New York, N.Y.: American Management Association, Management Bulletin No. 73, 1966.

(13) Vrettos, Louis and Anastasi, T.E. Jnr. Company-Sponsored Employee Education: Results of a New Survey and Conference. Training and Development Journal, May 1966, 19-29.

- 117 companies in the greater Boston area.

## APPENDIX D

### SELECTED EXPLANATIONS FROM THIRTEEN DEPARTMENTS AND AGENCIES OF THE NEED FOR TRAINING TO MEET "GENERAL REQUIREMENTS"

| Employee Category | Institution | Course | Full Departmental Explanation* |
|---|---|---|---|
| Technical | U. of Sask | Financial Control | "No relation to present duties, but of some benefit to Branch - to encourage employee to further knowledge and development" |
| Admin. Support | Carleton U. | Political Science | "As secretary to the Chief of ... Division some knowledge of the accounting discipline is highly desirable for the effective performance of duties." |
| Technical | Carleton U. | Psychology | "The compiling and drafting of source copies." |
| Admin. Support | Carleton U. | English French | "Towards a B.A." |
| Admin. and F.S. | McMaster U. | Russian German Sociology | "Improve promotion opportunities" |
| Technical | Ottawa U. | Metaphysics | "To improve employee capabilities and enhance opportunities for advancement." |
| Scientific and Prof. | Carleton U. | Political Science | "Enhance administrative capacities." |
| Admin. Support | Carleton U. | Political Science | "Better insight into roles of dept. and government as a whole." |
| Admin. and F.S. | Carleton U. | Economics | "Employee is attempting to take his university degree in Public Administration and this is a compulsory subject." |
| Admin. and F.S. | Carleton U. | Psychology | "Add to educational qualifications." |

. . .

| Employee Category | Institution | Course | Departmental Explanation* |
|---|---|---|---|
| Admin. Support | Carleton U. | Philosophy | "Training was approved to broaden the knowledge of the candidate which was felt a definite requirement in position assumed as secretary to....This training along with other such courses will prepare her to assume more responsible duties in the future." |
| Admin. and F.S. | Ottawa U. | History<br>Philosophy<br>French (2) | "Participating in a degree programme." |
| Admin. and F.S. | College Ste. Marie | Etudes Classiques | "Obligatory subject to obtain BA - to improve qualifications." |

* Departmental explanations were in response to the question: -

"RELATIONSHIP OF TRAINING TO DUTIES - Give specific reasons why training was approved. Indicate in what way the training taken will improve productivity on the job."

N.B. The Government share of costs paid in connection with the foregoing training was about $835.

## APPENDIX E

## INTERNAL POLICY ON AUTHORIZING DEPARTMENTS TO REIMBURSE 100% OF EVENING AND CORRESPONDENCE COURSE FEES

1. By the general authority of T.B. 620135, as amended, departments and agencies in the Public Service are authorized to reimburse up to 50% of tuition fees for evening and correspondence courses.

2. Special authorization has been granted for reimbursement programs at the 100% level, where, in some combination, the following circumstances pertain

   - The work to be performed is necessary to fulfil the objectives of the department.
   - Normal staffing action has not resulted in assignment of sufficient skilled employees to carry out the work.
   - The training is necessary before the work can be performed with average competence.
   - The training forms a part of a program of changed utilization of employees who are becoming redundant.
   - There is an urgent need for a rapid increase in the rate of training taking place.

3. Authorization of a 100% reimbursement program has not been granted where

   - The knowledge or skill to be acquired was a condition of, and presumed present at the time employees were first appointed.
   - The shortage of employees having particular training falls below 10% of the total number required.
   - More employees are being trained, having made an allowance for failure, than is necessary to fill positions for which the training is required.

   And unless

   - The training relates to the present work assignment or specific future work assignment for which the trainee is being prepared.

- The training will form a part of a centrally-managed departmental program, subject to Treasury Board review on an annual basis.

4. Authorization of 100% reimbursement is also granted in an individual case where an employee has previously received 100% reimbursement of tuition fees in a department from which he has transferred, provided that the training still relates to his new duties in the department now employing him.

APPENDIX F

REPORT OF AN AD HOC ADVISORY COMMITTEE
ON THE EVENING AND CORRESPONDENCE COURSE
POLICY STUDY (T.B. 620135)

On April 4, 1968 an ad hoc committee of senior departmental training and development specialists was convened for the purpose of advising on the present Evening and Correspondence Course Policy. This group was composed of: -

| | |
|---|---|
| J. Aldred | - Public Works |
| D. Black | - Transport |
| J. Elliot | - Industry |
| I. Harlock | - Indian Affairs and Northern Development |
| F. Lancaster | - National Revenue (Taxation) |
| G. Law | - Dominion Bureau of Statistics |
| B. Seed | - Energy, Mines and Resources |

Prior to the meeting copies of a draft Report of a study on the Policy were forwarded to committee members. All data was included but no conclusions. The group met and reached its own conclusions without the intervention of Treasury Board Staff. The committee conclusions were as follows: -

1. Employee Eligibility

Training should be available to all employees, regardless of class or grade, so long as it is related to meeting identified needs and receives prior approval.

2. Program Exemptions

Language instruction should be treated in the same way as other training.

3. Non-Working Time

Policy should be changed to cover all training "outside working hours" instead of simply training in the "evening".

4. Prior Approval

This is necessary and desirable.

. . .

5. Job-Relatedness and Payment Scale

Deputy heads should be authorized to pay up to 100% to meet identified organizational needs, or up to 50% to meet career development needs.

Departments should develop their own criteria to distinguish between the two levels of payment.

Textbooks should be included at whatever proportional rate - 50% or 100% - otherwise applicable.

Following presentation of the foregoing conclusions to Board Staff, there was a discussion of

- areas of difference with Staff in the foregoing. (These proved minor).

- additional conclusions viewed by Staff as necessary.

Agreement was reached on each area of difference and has been embodied in the text of the Report.

END

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